Individual Questionnaire – 2025 Ensure this questionnaire is completed and included with your records Client Name: Phone: Email: To: McConnell Stafford-Bush & Associates **Terms of Engagement** I hereby instruct you McConnell Stafford-Bush & Associates and staff/contractors as applicable to prepare my Taxation Returns for the 2025 year. I undertake to supply all information necessary to carry out such services and will be responsible for the accuracy and completeness of such information. Authority is given to obtain information from Inland Revenue, other government agencies and financial institutions about all tax types (except child support), bank and loan accounts in order to complete the above assignments. This includes obtaining information through all Inland Revenue media and communication channels including electronic ones. I authorise your organisation to act as my agent for ACC levy purposes for all associated entities. This authorisation allows your organisation to query and change information on my ACC levy account(s) through ACC staff, and through MyACC for Business. This authority will also allow your organisation's main representative discretion to delegate access to my ACC information to other members of your organisation. Other delegated members of your organisation will also be able to guery and change information on my ACC levy account. You are to represent me as my tax agent. All income tax returns will be signed by me however you are authorised to sign any other taxation return on behalf of myself or any of my associated entities. I also accept that you have the right to charge interest on overdue accounts at the rate of 2.0% per month, and that all accounts are due for payment by the 20th of the month following invoice date. The charging of such interest will be at your discretion. I accept that any collection costs you incur will be fully recoverable from me. Signature _____ Date ___ Comments **Records Required** Wages/National Superannuation/Benefits Please provide us with the names of any organisations you have received the following from: Wages Termination or incentive payments П ACC payments National Superannuation П Any other benefits In most cases IRD will have sent us these details direct, however we do need to check all details have been included. Student Loan Do you have a student loan? If so, please provide your latest statement from IRD **Interest and Dividends** Please supply the advice slips. • For interest received, you should have an annual advice notice showing the withholding tax deducted. This may be on the bottom of your bank statement dated 31 March • If any dividends are taken as bonus shares, also include these advice slips

Rental and Leased Property

Please complete attached rental questionnaire		
Mortgage Interest Paid on Residential Properties		
Have you incurred interest on residential properties owned (which is not your main family home or a 'new build*')? Is the interest also against properties other than residential rentals? If so, please provide details of amount of interest and dates paid. * A new build is a self-contained residence that receives a Code Compliance Certificate confirming the residence was added to the land on or after 27 March 2020		
Partnerships, Trusts, Estates and Companies		
Please supply details of income earned from any entity for which we do not prepare the accounts and tax returns.		
Overseas		
 Supply details of overseas interest, dividends, wages received, any other income, and taxation paid Provide details of any overseas investments held at any time during the financial year 		
 Attach all of your investments advisor's reports Have you at any point in your lifetime, ever contributed to a foreign superannuation scheme, even if you cannot receive the benefits until you retire? 		
Any Other Income		
 Attach details: Income Replacement Insurance Policy – provide details of premiums and claims Look Through Company or Partnerships – if you have been allocated a share of income or a loss other than from a company that we are aware of, please provide details Did you receive income from any other sources either taxable or non-taxable? If Yes, please provide details (e.g. Uber, Airbnb, services through platforms such as Pocket Job, Airtasker etc). 		
Donations		
Do you want us to complete your rebate claim form? Yes _ No _ If so, please attach receipts.		
Working for Families Tax Credits and Parental Tax Credit		
Please supply full names and birth dates of all children. Please note the following:		
 If you had a child born within the current financial year you may be eligible for the Parental Tax Credit. Please include their IRD Number below. If you do not have this you will need to obtain one for them in order to claim any entitlement for them Where a child has become financially independent during the current financial year, please advise the date they left school or home 		

Child's Name	IRD No.		Date of Birth	Date left School
				
If you have received Working for Families Tax Credits during t supply the certificate issued to you by IRD, detailing the amou				
Also provide details of any child support or maintenance paym received.	ents made or			
If we do not prepare your spouse or partner's taxation return, pus with details of their income.	olease provide			
Have there been any changes to your family circumstances, in change in responsibility for your dependent child(ren), you have separated or otherwise changed your family circumstances? I provide details.	e married,			
Do you share custody of your child(ren) with anyone other that If so, please provide details.	n your partner?			
Did you work on average less than 20 hours per week if single your spouse / partner combined work less than 30 hours per w please provide details.				
Additional income information - Working for Familie	s Tax Credits			
You are required to supply details of income received from the sources:	following			
Salary exchanged for private use of a work				
 Vouchers and other short-term charge facilities 				
 Major shareholder in a close company 		님		
Non-locked-in PIE income				
Certain pensions and annuities				
Distributions from retirement savings schemes				
Distributions from superannuation schemes				
Tax-exempt overseas pensions				
Tax-exempt salary or wagesOther income (if you or your partner get more than \$5000 p	er vear to help			
with your living costs)	or your to noip			
Children's passive income				
Non-resident spouse or partner's income				
Non-beneficiary distributions from a trust				
Non-resident borrower's overseas income				
■ Losses				
Settlor's attributable trustee income				
Attributable fringe benefits Main income acqualization cohomo denocito				
Main income equalisation scheme deposits Main income equalisation scheme refunds				
Main income equalisation scheme refundsRetirement savings schemes contributions				
Income from a retirement savings or superannuation schem	e PIF			
Depreciation recovered on sale of a building	- · · -			

	A detailed description and examples of above income types is available from the IRD website: https://www.ird.govt.nz/income-tax/income-tax-for-individuals/adjust-your-income/types-of-income	
I	Residential Land Withholding Tax	
	Have you sold residential property in New Zealand where Residential Land Withholding Tax has been deducted and paid to the IRD? If so, provide details e.g. IR1100 Residential land withholding tax return and other sale and purchase documents.	
I	Residential Property Sales	
	Have you sold any residential property during the year (not otherwise detailed on the information provided)?	
I	If yes, when was the property purchased?	
	If it was sold before 1 July 2024, and purchased within 5 years of the sale date OR if it was sold on or after 1 July 2024 and purchased within 2 years of the sale date:	
I	what was the original purchase price	\$
	and the sale price?	\$
	 has it been used as your main home for the full time it has been owned? If not, please provide dates and details on the nature of the shared use. 	

Mixed Use Holiday Home			
Do you have a property (such as a holiday home or a bach) that is used privately a	and also to derive income?	П	
	Yes ☐ No ☐		
If yes, provide details of property:			
Was the property empty for 62 days or more in the income year?	Yes ☐ No ☐		
If yes, please complete the following section so we can determine the amount of all			
Mixed Use Holiday Home – Information Required			
The number of days the property was empty during the income year			
The number of days the asset was used by family or associated persons* during the income year OR where income from any person received was less than 80% of market rate * Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property			
If there is more than one tenant who used the property through the year, please att	ach details.		
Name of tenant:		Ш	
Relationship to owner (if any):			
Amount of rent they paid: \$			
Dates rented (From: To)			
Expenses incurred in respect of the property (the list below is not exhaustive – deta required):	ails of all expenses will be		
Cost of advertising for tenants	\$		
Cost of repairing damages caused by tenants	\$		
Number of days spent in the property while repairing damages caused by tenants			
Mortgage interest	\$		
Rates	\$		
Insurance	\$		
Repairs/maintenance for general wear and tear	\$		
Other (please give details) :			
Mixed Use Boat or Plane			

Do you have a boat or plane (with a market value of \$50,000 or greater), that is used privately and also to derive				
income?	Yes N	o 🗌		
If yes, provide details:				
Description:				
Market value: \$				
Was the asset unused for 62 days or more in the income year? Yes \(\subseteq No \subseteq \) If yes, please complete the following section so we can determine the amount of allowable deductions.				
Mixed Use Boat or Plane - Informatio	Mixed Use Boat or Plane - Information Required			
The number of days the asset was unused of	during the income year	_		
	amily or associated persons* during the income year			
	OR where income from any person received was less than 80% of market rate * Associated persons include close relatives, or if owned by an entity, persons associated with the entity owning the property			
For non-associated persons where payment	received is at least 80% of market value:			
Number of days the asset was used:				
Income received:	\$			
Expenses incurred in respect of the property required):	(the list below is not exhaustive – details of all expenses will be			
Cost of advertising for hireage	\$			
Cost of repairing damages caused by hireag	e \$			
Operating costs / supplies	\$			
Insurance	\$			
Repairs/maintenance for general wear and to	ear \$			
Other (please give details)				
Cryptoassets				
Have you received or traded in cryptoassets please provide the following information:	during the income year? If so,			
The type of cryptoasset				
For each transaction provide the da or disposed of, number of units, value				
Total units of each cryptoasset held year				
Exchange records and bank statem	nents			
Wallet addresses				

Thank you for completing this questionnaire Don't forget to sign it